



GUIDE

3 strategies for closing the CX gap

Tools and tips for building a CX program that surpasses customer expectations

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CX has finally taken center stage. It's a top priority for leadership, and 69% of CX pros say budgets are up. It would seem that CX is primed to take off and play a leading role in helping their companies succeed.

There is a flipside:

CX teams are under pressure to meet both customer expectations and company objectives. Our study shows that CX pros are split in their priorities—over half cite exceeding customer expectations as their top challenge, while almost the same amount say meeting company performance goals tops the list.

The fact is, it's hard to do both.

87%

of CX pros say CX is a priority for leadership at their company

54%

of CX pros say meeting and exceeding customer expectations is their top challenge

52%

of CX pros say increased performance expectations is their top challenge



To better understand CX priorities, we launched two concurrent studies; one with consumers and another with CX professionals.

The results showed that a significant gap exists. We call it [the CX gap](#).

The CX gap

Closing the CX gap starts with collecting data at each touch point on the customer journey to get an authentic view of what customers actually want. Daring to ask the tough questions is just the start—you need to take action and be willing to change course.

A positive CSAT score is great, but adding questions that ask what's working—and what's not—is where the real improvements are made. Was the service interaction personalized? Efficient? What could you have done better?

Unlocking the keys to customer satisfaction might be easier than you think. In a separate study¹, We found that consumers are waiting for companies to ask them what they want—and are more than happy to share their opinions.

76%

of consumers want to be asked for their opinion on new product and service developments

Only 35%

of consumers say the brands they purchase from make them feel like the brand really knows them

And yet, only a third of consumers believe that the brands they purchase from understand what they want on a personal level.

¹ SurveyMonkey survey of 3,458 U.S. adults 18+ was collected March 12-16, 2024



A roadmap for closing the CX gap

CUSTOMER EXPERIENCE

1. Develop and manage the customer experience at key touchpoints to increase loyalty

SERVICE, SUPPORT & SATISFACTION

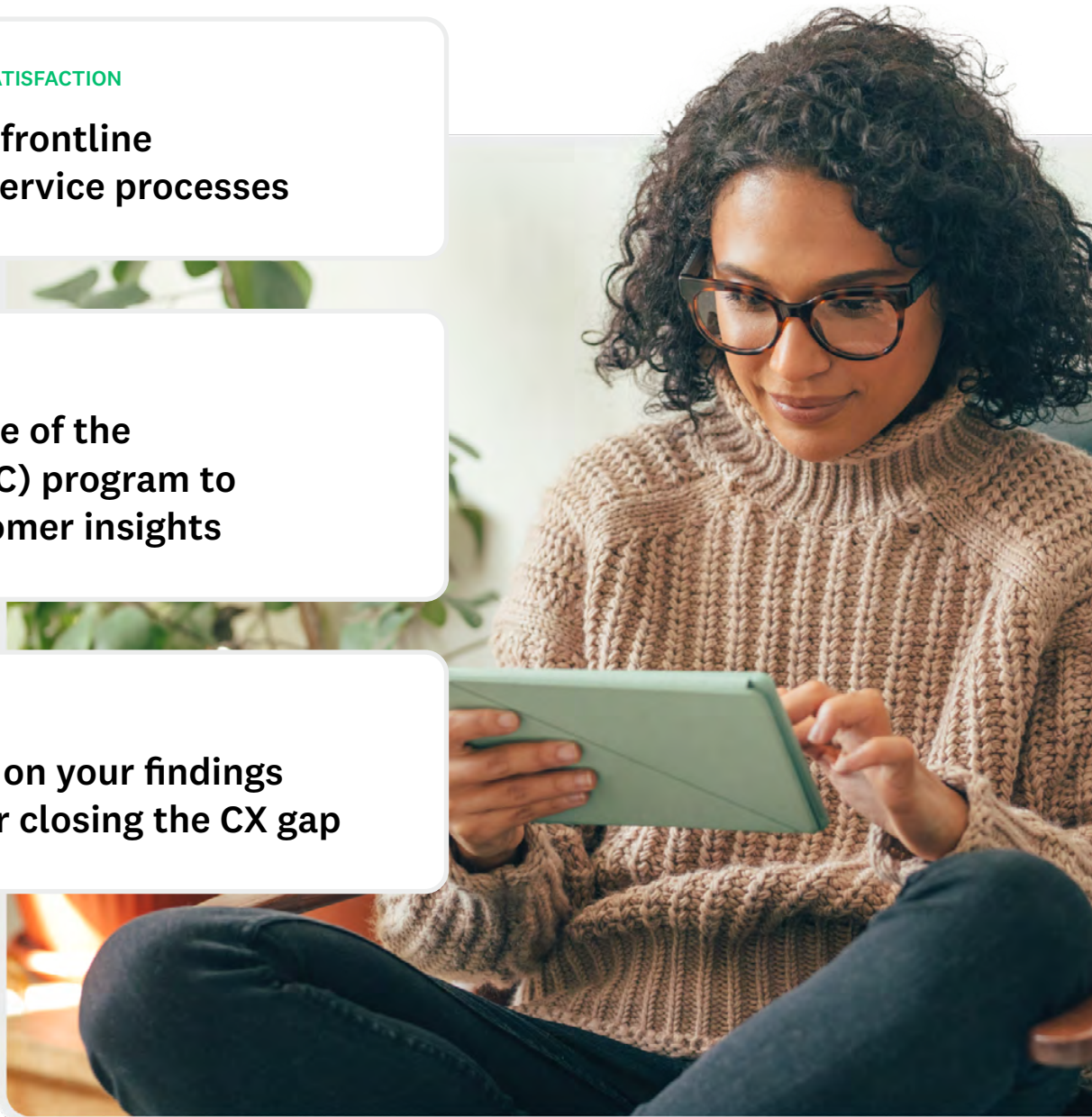
2. Streamline frontline support and service processes

CUSTOMER INSIGHTS

3. Build a voice of the customer (VoC) program to uncover customer insights

RESOURCES

**Taking action on your findings
A roadmap for closing the CX gap**





STRATEGY ONE

Customer experience

STRATEGY ONE

Customer experience

Optimize the customer experience at key touchpoints with CSAT, Net Promoter Score® (NPS®) and integrations

A good customer experience is different for every company. It depends on the products you offer, how you sell or distribute, your budget, and most importantly—your customers.

Do your customers rely on email or phone calls for support, or do they prefer self-service? Are long wait times their main issue or are they frustrated by talking to multiple service reps to resolve a problem?

It's hard to know what will land with customers. Almost half (45%) of CX teams are prioritizing more personalized interactions and 40% say they will use AI to deliver more customized experiences.

However, 75% of consumers believe personalization equates to interacting with a human, and 43% say it requires Individualized customer support.

So how do you know what defines a positive experience for your customers? The best way to find out is to ask.

Here are three solutions for improving the customer experience.



1. Measure customer satisfaction across the customer journey with CSAT surveys

[CSAT](#) is the foundation of a CX program—it measures how your customers feel about all interactions with your organization. It helps you understand what’s working well, and where there are opportunities to take action.

Let’s say you’ve added a new service offering, like a chatbot, to automate customer interactions. Your chatbot solution likely includes analytics that show improvements in key metrics, like wait times, but how do your customers feel about it?

That’s where a [CSAT survey](#) can provide context. Send a quick CSAT study to customers who interacted with the chatbot asking about their experience. Include questions that tie back to your goals—did the chatbot give customers a sense of personalization? Did they feel like their issues were resolved faster?

By tying CSAT feedback to your goals, you can quickly get a sense of how new initiatives are landing, and make sure that what you’re offering is really serving your customers.

1.1 How CSAT can uncover deeper CX insights

You can harness CSAT surveys for anything you want—from uncovering overall brand sentiment, to understanding the impact of a new offering and where you can improve.

Here’s a series of CSAT questions that could be used to uncover how customers feel about a new service offering.

1. How would you describe your recent interaction with our chat service on our website?

Helpful

Personalized

Efficient

Ineffective

Frustrating

2. How would you rate your recent interaction with our chat service on our website?

Very satisfied

Satisfied

Dissatisfied

Very dissatisfied

3. What can we do to improve this service for you?

Answer



1.2 Getting started with CSAT

1

Start with an overall [company satisfaction survey](#)—it could be a single question that asks customers to rate your company on a scale

2

Follow up support interactions with a CSAT survey about the customer's experience with your service team

3

Add a CSAT survey any time you roll out a new product to gauge customer response

4

Try gathering sentiment with open-ended questions that ask customers what you can do to improve the experience

1.3 Strengthening your CSAT program

1

Consider CSAT as a way to build a relationship with your customers gather more in-depth feedback over time

2

Add questions about product usage or pricing sensitivity to better understand your customers

3

[Capture CSAT across touchpoints](#)—via text, offline, at POS, on your website and more

4

Try a CSAT template that allows you to benchmark how you compare to similar companies



2. Understand what drives customer loyalty with an enhanced NPS study

[Net Promoter Score®](#) (NPS®) is a simple indicator of whether a customer is likely to recommend your company. It's one of the most commonly collected CX metrics, breaking down customers into categories of promoters, passives, and detractors, and providing a simple equation to determine customer loyalty.

With a few additional questions, an NPS study can do much more. It can help you correlate how company initiatives and strategy decisions impact loyalty and satisfaction.

For example, NPS can be a great way of understanding how personalized your offerings currently are, and what you can do to improve. Adding a key driver question to the standard NPS study can add context and meaning to your customers' responses.

Add follow-up questions for each driver that might impact NPS. Use a Likert scale format to allow customers to weight each driver individually.

Thinking about the your recent purchase from this brand....

1. How satisfied were you with the **EFFECTIVENESS** of the brand's customer service?

- Very satisfied
- Satisfied
- Not satisfied or dissatisfied
- Dissatisfied
- Very dissatisfied

2. How satisfied were you with the **RESPONSIVENESS** of the brand's customer service?

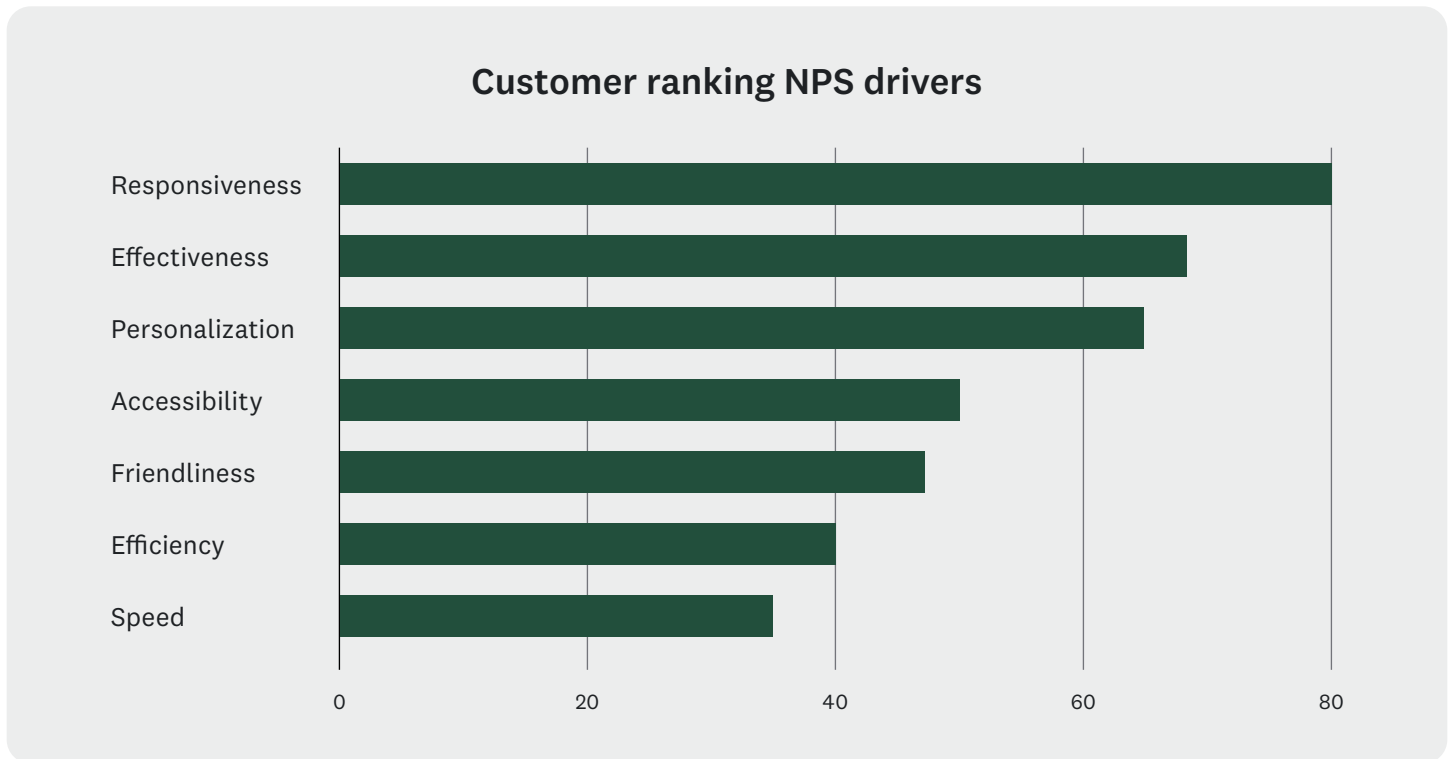
- Very satisfied
- Satisfied
- Not satisfied or dissatisfied
- Dissatisfied
- Very dissatisfied

3. How satisfied were you with the **PERSONALIZATION** of the brand's customer service?

- Very satisfied
- Satisfied
- Not satisfied or dissatisfied
- Dissatisfied
- Very dissatisfied



Adding driver questions can give stakeholders across your company a better understand of what's driving NPS. Use this feedback to create a visualization that puts these deeper insights in context.



2.2 Getting started with NPS

1

Start with an NPS survey about your company, then add “transactional” NPS studies to understand sentiment about a product or service

2

Capture NPS [across customer touchpoints](#), including a web page or SMS. Use email to collect NPS to provide a customers with a one-click response

3

Get started quickly with templates that include certified NPS questions; [view benchmarks](#) on how you stack up to companies in your industry

4

Track your NPS scores over time with [Data Trends](#); share results easily with Workgroups

1

Add a key driver question to your survey without deleting any previous questions or responses

2

When adding key drivers make sure you use positive terms—ask if a product is “affordable” instead of “expensive”

3

Apply [Question Skip Logic](#) when creating an NPS survey so you can direct different follow-up questions to Detractors, Passives, and Promoters accordingly

4

Map NPS responses into Salesforce and share via email or a link with team members to identify which customers are detractors and promoters



 **Pro tip:**

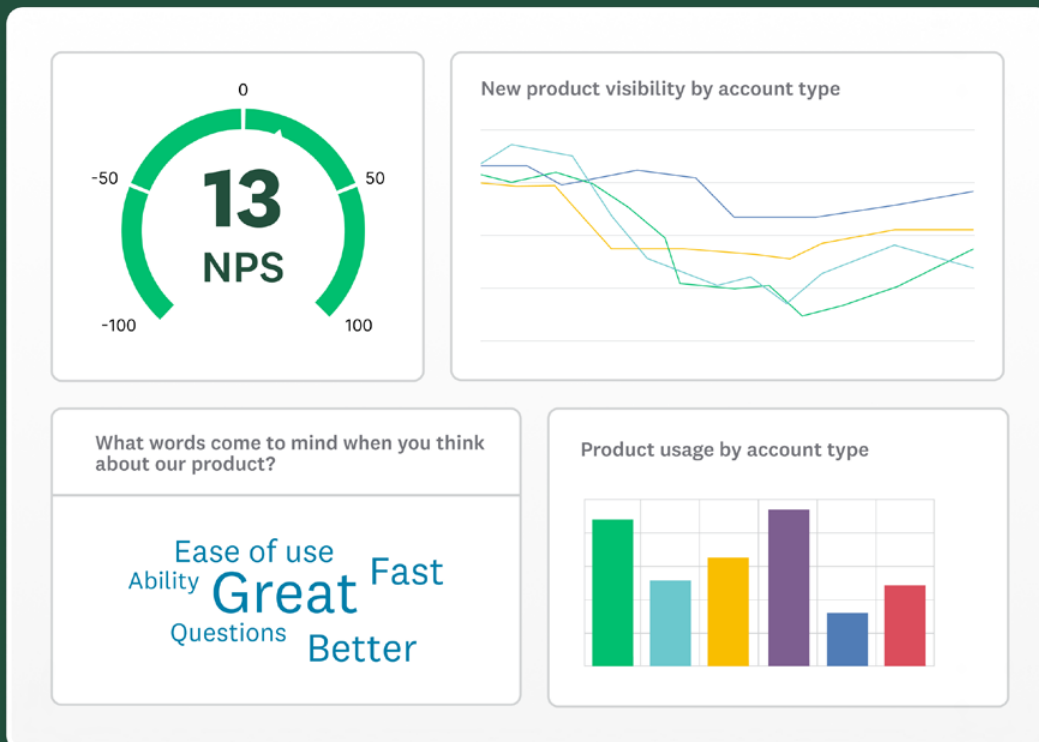
Do more with NPS, CES, and CSAT using the [Salesforce Integration](#)

CX feedback, particularly NPS, CES, and CSAT data, is more powerful when combined with customer data in Salesforce. It can give you an at-a-glance view of how customers view your company overall, allows you to easily track key metrics about the CX experience, and share these findings with team members.

Easy-to-read dashboards aggregate data and give teams across the organization an overview of how customers are feeling. It can also highlight where your efforts are paying off or need improvement.

In addition, integrating survey data in Salesforce helps you to identify customers that are satisfied or dissatisfied, and develop targeted strategies to nurture loyalty, address concerns, and move customers to a more positive standing.

Salesforce dashboard highlighting CX data



CASE STUDY

Greyhound

Key metrics



Improved NPS by
15 points



Reduce time to
insights by **94%**

Transportation leader [Greyhound](#) replaced a dated survey process with SurveyMonkey to improve response rates and get a clear view of the customer experience. They went from a 58-question manual survey with an 18% completion rate to a 5-question online survey with a 94% completion rate. An AI-based analytics program helped station managers review customer feedback in less than 3 minutes per week. This streamlined process surfaced issues and allowed customers to provide in-the-moment insights that were addressed quickly.



“Within a few months, our NPS score was up almost 15 points. After one year, almost 90% of station managers log in to get a daily view of customer satisfaction drivers for a specific station in their city. The ability to correlate open-ended responses with NPS and other metrics from short surveys surfaced actionable insights that other approaches would miss.”

Matthew Schoolfield

Senior Manager of Commercial Analytics
and Voice of the Customer
Greyhound Lines





STRATEGY TWO

Service, support & satisfaction

Top three CX pain points for consumers

42%
long wait times

40%
unhelpful automated responses

37%
transfers to multiple departments

STRATEGY TWO

Service, support & satisfaction

Streamline frontline support and service processes

Here's something CX pros and consumers agree on—customers are spending too much time and effort to get what they want and have their issues addressed. That friction impacts loyalty and customer churn.

[SurveyMonkey research](#) shows that 91% of consumers will likely recommend a company after a positive, low-effort experience. And the flip side is true—[81% of customers](#) who've experienced a high level of effort will share negative comments.

These may seem like basic problems to solve but they impact every service interaction. In our research, 61% customers are more interested in having their problems solved than with attempts to overdeliver. Meeting expectations is more important than delivering innovative, exceptional experiences.

Here are 3 solutions CX teams can use to reduce friction and customer churn.



1. Improve CX processes interactions with a customer effort score (CES) program

Low-effort interactions are the foundation of any great customer experience. Reducing friction can have a big impact at every touchpoint—that's where a customer effort program comes in.

One of the reasons why [CES studies](#) are so effective is that you can survey almost any customer touchpoint. By slightly changing the CES question, you can gather information on different processes in your business.

Each of these questions will provide data to help you calculate your overall customer effort score. More importantly, by asking multiple questions at different touchpoints, you can monitor areas of improvement as well as how changes you make are working.

Here are a few examples of CES questions →



1. How would you describe the check out process you experienced today?

- Easy
- Personalized
- Efficient
- Ineffective
- Frustrating

2. How much do you agree with the following statement?

[Company] makes it easy to find the products I'm looking for on their website.

- Agree
- Somewhat agree
- Neither agree or disagree
- Somewhat disagree
- Disagree

3. How would you rate the ease of resolving your issue with customer service today?

- Very easy
- Easy
- Neither easy or difficult
- Difficult
- Very difficult



1.2 Getting started with a CES study

1

Start by sending a CES study after a product purchase or a customer service interaction—these are places where customers commonly feel friction

2

Make sure you have a goal for your CES study that includes monitoring and streamlining the pain points your customers care about most

3

Use [CES templates](#) to get started quickly; harness benchmarks to understand how your CES score stacks up

1.3 Expanding your CES program

1

Easily capture CES from more customers by [collecting responses through multiple channels](#), including email, website, or SMS

2

Share CES insights across your organization to take action on the tools, systems, policies, people, and processes that shape CX



2. Evaluate customer satisfaction after an interaction with customer service feedback surveys

Customer service teams are asked to do a lot—they are the frontline of your CX efforts and often the face of the company.

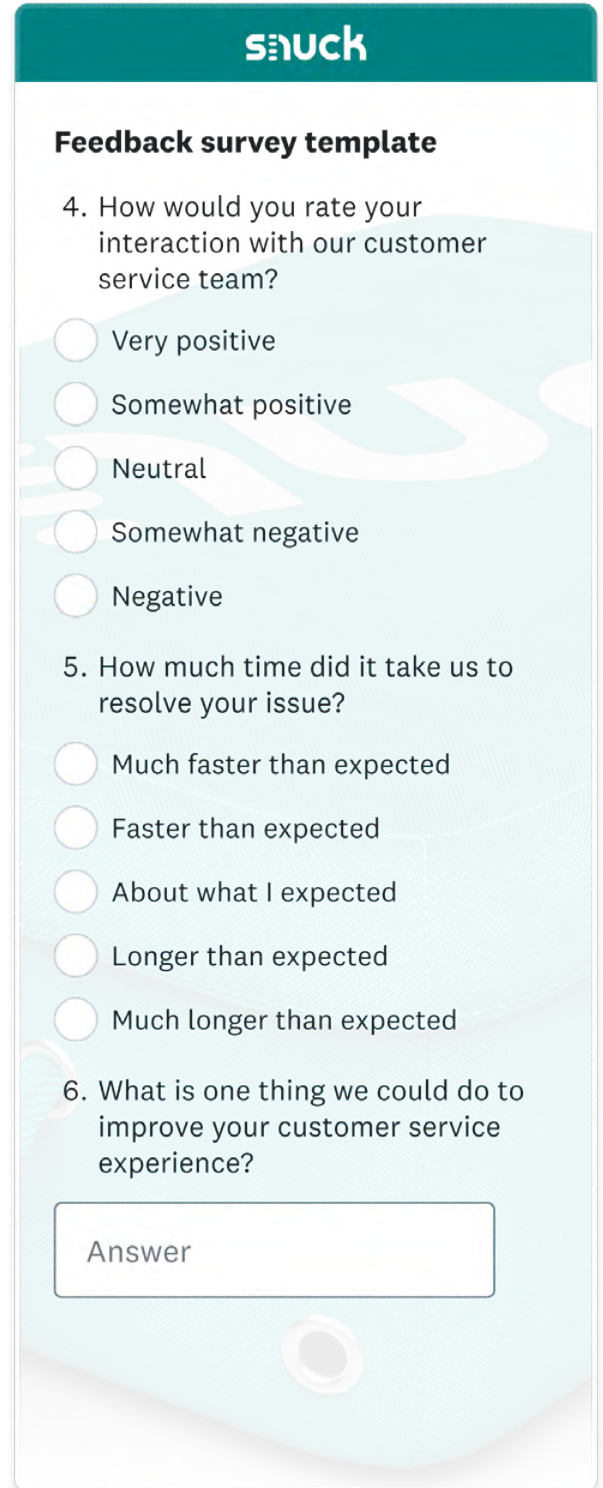
However, that's likely to change—33% of consumers notice less frequent interactions with human agents as AI spreads.

That's not a bad thing—CX pros believe that AI will improve their ability to deliver a better, more personalized experience. But, it does emphasize the need to connect directly with customers after every interaction—be it with a human, a bot, or a self-service activity—to understand the impact on customer satisfaction.

[Customer service feedback](#) can be collected at every touch point and by multiple teams. That's why having a strategy is key—and making sure that all feedback is stored in a single platform that is accessible to all teams who can take action.

A customer service feedback survey needs to be timely to be relevant. Plus, asking the right questions is critical to getting a consistent and trackable view of customer satisfaction.

Here are some examples of [customer service survey](#) questions:



SNUCK

Feedback survey template

4. How would you rate your interaction with our customer service team?

- Very positive
- Somewhat positive
- Neutral
- Somewhat negative
- Negative

5. How much time did it take us to resolve your issue?

- Much faster than expected
- Faster than expected
- About what I expected
- Longer than expected
- Much longer than expected

6. What is one thing we could do to improve your customer service experience?

Answer



2.1 Getting started with customer service feedback

1

Get started quickly and ask the right questions with a [pre-built template](#)

2

Centralize customer service feedback on one platform so all teams have access to a single source of truth

3

Create accountability with secure collaboration tools that allow teams to access and share feedback

2.2 Expanding your customer service feedback program

1

Customize your survey for your organization using 25+ question types

2

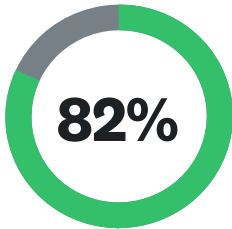
Integrate with your CRM to automate case closed workflows, and to close-the-loop with dissatisfied customers



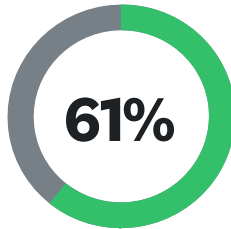
3. Reduce friction in the buying process by measuring purchase satisfaction

When it comes to making a purchase, customers can be put off by just about anything—an unexpected fee, a difficult navigation, or clumsy check-out process. These factors can create friction that can reverse purchase intention.

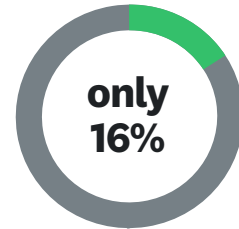
Many companies take their foot off the gas once the sale is made and put less effort into the post-purchase process. It's not lost on consumers.



82%
of customers have backed out of an online purchase due to a negative experience²



61%
of customers say they get the most personalized attention from companies before or during a purchase



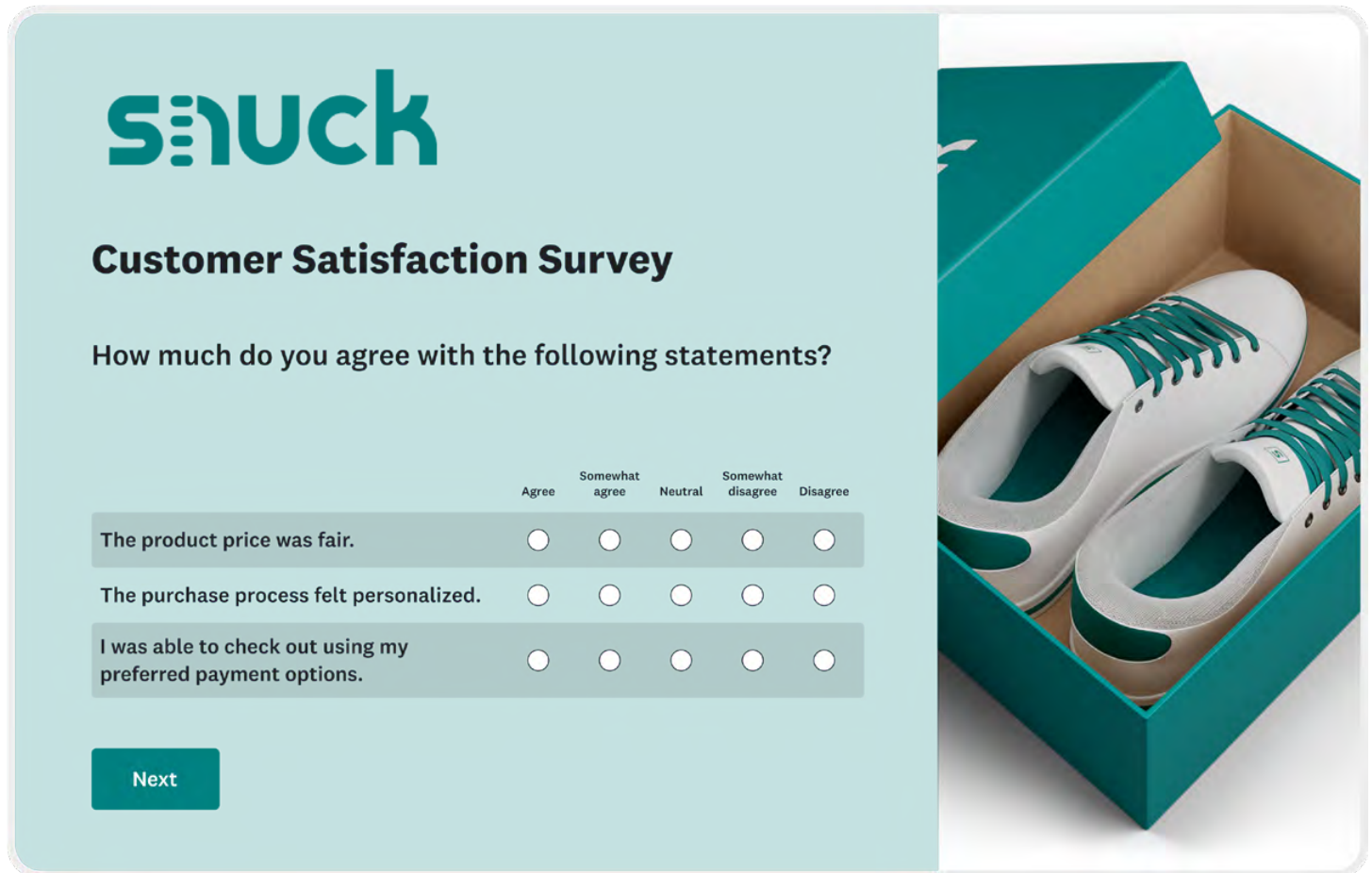
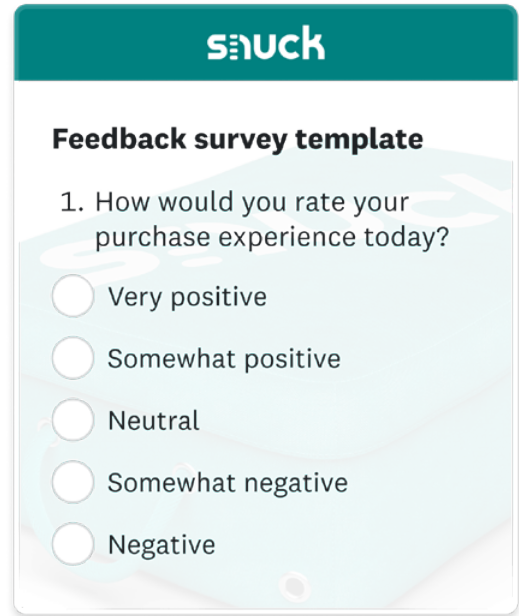
only 16%
say their interaction is personalized immediately after a purchase

²This [SurveyMonkey](#) study of 1,000 consumers was collected on Apr 24, 2023.



That’s a missed opportunity. Understanding [what drives purchase satisfaction](#) is a crucial part of customer loyalty, retention, and repeat revenue. It can also provide invaluable insights on what your company is doing right and where it needs to improve.

Here are a few sample purchase satisfaction questions.



3.1 Getting started with purchase satisfaction surveys

1

Ask the right questions with a [pre-built template](#)

2

Customize your survey to capture deeper insights using 25+ question types

3

Automatically send a purchase satisfaction study after a customer transaction by integrating in with your CRM

3.2 Expanding your purchase satisfaction program

1

Use [enterprise-grade branding and customization features](#)

2

Include visuals in surveys about your web or app experience to understand optimization opportunities



CASE STUDY

WinMagic

Key metrics



Boosted renewal scores



Raised NPS scores to a **9**



Increased CSAT scores from **64%** to **93%**

When WinMagic wanted to pinpoint the root cause of less than positive NPS and CSAT scores, they moved to SurveyMonkey Enterprise and cut a 35-question survey down to 6 questions. The company also integrated customer feedback in Salesforce, linking individual agent interactions to customer issues and providing valuable insights to the sales team, who could approach renewals with an understanding of a customer’s sentiment. In addition, WinMagic harnessed anecdotal data found in the Salesforce integration, analyzing statistical feedback to identify product trends and areas for improvement.



WINMAGIC

“As we embrace this transition, one thing is clear: facts speak louder than words. We are evolving from a reliance on anecdotes to becoming a data-driven organization, where our decisions are backed by concrete numbers and the corresponding feedback.”

Kevin David

Director of Global Technical Support
WinMagic





STRATEGY THREE

Customer insights & Voice of the Customer

STRATEGY THREE

Customer insights & Voice of the Customer

Develop and maintain a VoC program to get a 360° view of the customer experience

Customers are sending signals everytime they connect with your company that paint a picture of the experience you're delivering. The issue is—customers want to connect in just about every way possible.

In our study, customers checked every box in terms of contact preferences—from email, to in person and chat. When CX pros ranked their top channels for collecting feedback, there were some differences in priority, but are generally in alignment with consumer preferences.

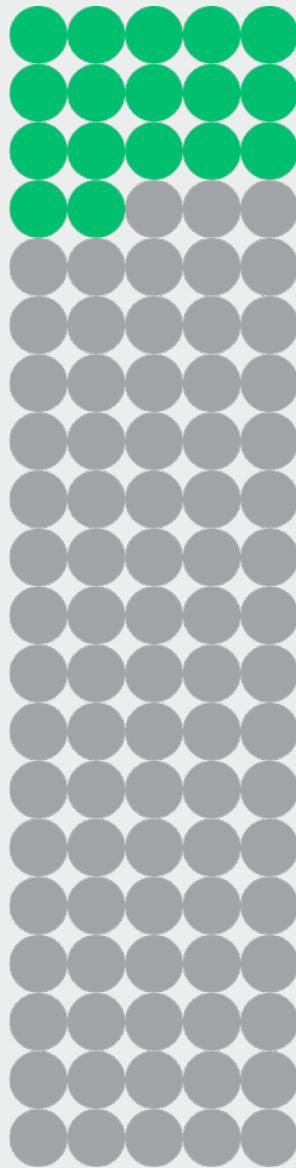
Consumers vs. company channel preferences

	Consumers	Companies
Phone call	49%	39%
Email	47%	49%
In-person	39%	38%
Messaging/chat	34%	32%
Website	23%	46%
Mobile app	22%	32%
Social media	13%	38%



The discrepancy between channel preferences highlights the fact that companies and consumers may be focused in different places. It also highlights that every channel is important, even social media, which comes in last but companies recognize as being a higher priority.

When we asked companies where they were collecting data, the response showcased another disconnect—less than two out of ten companies are collecting data across channels



Only

17%

of CX pros are
collecting feedback
from all channels

That's where a [Voice of the Customer \(VoC\) program](#) comes in. It's a commitment to both collecting customer feedback and taking action on that feedback. The goal is to close gaps between customer expectations and your organization's performance. When you maintain an effective VoC program, the data you collect empowers your employees to exceed customer expectations, too.

Establishing a VoC program requires a systematic collection, analysis, and monitoring of all customer interactions with a product, a service, or your company. These interactions can happen on any channel, and that feedback needs to be collected at all touchpoints.



Here's how to create this 360° view of your customer

1. Listen across all channels

Your company collects customer feedback through surveys, feedback forms, and focus groups. Each stakeholder in your company will offer different ways to improve the customer experience.

For example, customer success teams work directly with customers and have a broad understanding of pain points and issues with products or services. Marketing teams collect competitive and market insights, and interact with customers via social media.

Sales understands price sensitivity and competitive solutions, and how product messages land with customers. And product teams can provide insights on product data such as churn or abandon rates.

All collected data should ladder up to company goals that are shared across the organization. CX teams can add context and meaning to captured data by using surveys to [capture feedback](#) in real time, across multiple channels.

Collect responses



Share a link



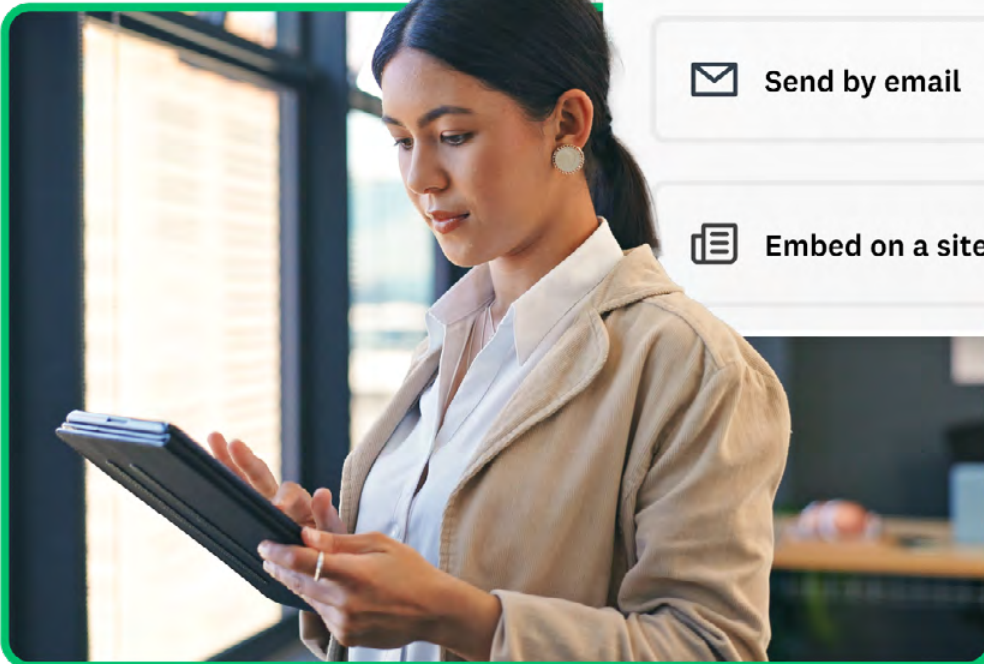
Buy targeted responses



Send by email



Embed on a site



2. Collect and share data in a source of truth

Once you've collected feedback, [advanced analytics](#) can offer deeper insights about your customers and their pain points. Take your analytics to the next level by integrating survey data with other customer data in a BI system, like [Power BI or Tableau](#).

Use these systems to create custom visualizations or to combine with other data sources for a holistic view of the customer. Work collaboratively with other stakeholders and teams by sharing custom reports and dashboards that are automatically updated. As new feedback and metrics are collected, you'll see in-the-moment insights on changes to your CX programs.

3. Share feedback across teams

Collected feedback needs to be shared to be of value. Customers' expectations for more personalized experiences mean that companies need to know what happened on their last interaction—and take that into consideration for future contacts.

An [enterprise-grade platform](#) will allow you to securely share sensitive feedback amongst team members. Simplify feedback collection and management with [survey integrations](#) for Salesforce, HubSpot, Mailchimp, Zendesk, Zoom, and more.

For example, a customer who is an NPS detractor should be flagged for the sales

teams who might need to rectify a bad experience with a special offer to try a service or product again at a discounted rate. A customer who provides feedback about difficulties with a checkout process might need reassurance from a service team member that their order has been received and is being processed.



3.1 Getting started with your VoC program

1

[Collect](#) feedback on all sales and service interactions

2

Uncover actionable insights with [analysis features](#) that don't require specialized skills

3

Collect data in a single platform that connects with CRM and BI systems

3.2 Expanding your VoC program

1

Advanced question types and [logic](#) features enable you to conduct sophisticated, in-depth research

2

Dive deeper into data with crosstabs and customizable reports that allow provide [deeper insights](#), fast

3

Integrate feedback with your analytics platform, [CRM](#), collaboration tools, and more to get a 360° view of the customer



Final thoughts

Your customers have weighed in and if you're like a lot of companies, there may be that gap between what they want and what you have planned. That's why CX teams need to pressure-test the status quo, constantly collect new insights, and deliver a customer experience that both meets company goals and customer expectations.

Here's a roadmap for closing the CX gap.



Listen with intention

Be open to what customers are saying, even if that means you need to change course. Chatbots and social media might be the future, but if you know your customers want human contact, even the best execution isn't going to change their mind. Be willing to take smaller steps, or larger leaps, based on the insights you gain from your studies.



Challenge assumptions

Ask questions even if you think you know the answer. A positive NPS doesn't mean your work is done; find out what customers like about the experience you deliver and what you can do better. Relying on what's worked is a recipe for falling behind competitors who might be wooing your customers with new services and experiences.



Take action with care

It's tempting to act quickly on a big idea and get it into market. Make sure that you have a way to measure and track the impact of your changes by continuing to collect feedback. Use this data to tweak a strategy or provide proof you should stay course.

Deliver experiences that surpass customer expectations

Get started

Methodology: SurveyMonkey study among CX professionals was conducted on April 5-6, 2024, comprising 307 customer experience professionals. SurveyMonkey study among consumers was conducted on April 5, 2023 among a sample of 1006 U.S. adults 18+. Respondents for both CX professionals and consumers were selected from an online non-probability panel.

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